

PROCESS RETURNS ELECTRONICALLY IN THE LOCALITY - TAX YEAR 2017

Effective Date

01/01/2018

Overview

Local offices have the ability to file individual income tax returns either on paper or electronically via e-File. The customer must be present when their return is being e-filed and it may only be done when they request it.

e-File is the Internal Revenue Service's (IRS) joint federal/state electronic filing program where tax returns are filed using commercial tax preparation software. Each local office must decide how they will use e-File for federal and state returns in order to communicate these services to customers. Localities can choose to: (1) prepare and e-file federal AND state tax returns, (2) e-file federal tax returns AND prepare and e-file state tax returns or (3) prepare and e-file ONLY state tax returns.

Localities that e-file returns will receive credit for **preparing** and **filing** the state return.

Returns filed electronically by Localities through e-File are considered "Direct" filed returns in terms of IRMS processing (even though the locality will receive credit as local filed). For tax due returns, unless the customer pays through Direct Debit or Credit Card, all check payments must be sent to TAX to be processed as "Direct" filed payments using a 760-PMT payment voucher or 760-PFF voucher if a farmer/fisherman.

Returns filed electronically streamline the processing of returns by eliminating the need for local office personnel to manually screen the paper documents. These procedures address all Locality electronic filing and preparing needs for customers' tax year **2017** returns.

In the event you have questions concerning electronic filing, answers to the IRS frequently asked questions and other additional filing information are located on the official IRS [website](#).

NOTE: Customers also have the option of using Free File or using TAX Fillable Forms to electronically file their income tax returns. These are third party products intended only for customers' use and localities must not use these products. To receive credit for preparing and filing returns electronically, localities must become an authorized e-File provider.

Tasks

[Become an Authorized E-File Provider](#)
[Process E-File Returns in the Locality](#)

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